YEP Basics

System Sign in to YEP *(Agresso)*
Use your University user name (for example js279) and password to *log into YEP (Agresso).*

Raising a Requisition

There are 3 methods of placing an order:

**Catalogue orders**
- Punchout to the catalogues (go shopping).
- Search for products as you would in any e-market (eg Amazon).
- Return basket to Agresso and generate to requisition.

**Freeformat orders**
- Search for product code and type over the description with your order details.
- Add additional description if needed in the large text box.
- Scroll down to complete the coding. You can change the VAT and account codes in this area if needed.

**Punchout (through go shopping)**
- The link takes you directly to the supplier’s website, select your items in a basket.
- Once selected create your requisition as you would a catalogue order.

What should it look like?

You can find examples of [how to structure your order here](#), how you’ll be invoiced should dictate the format of your order.

Financial regulation requirements

- You should use preferred suppliers where applicable.
- 3 quotes required above £5,000 –YEP search results count as quotes.
- Additional process for above £25,000 and EU-funded purchases.
Goods Receipting

- If you haven’t had an email advising an invoice has been received, then **goods receipt your order using the non-task method**.
- If you have received an email advising an invoice has been received, and you have a goods receipt task to complete, you must **goods receipt using the task method**. Otherwise you’ll continue to receive email reminders.
- You can part goods receipt an order e.g. ordered 5, received 2 OR ordered 1, received 0.5. If you expect more than 1 invoice however, it’s best to raise a call off order (see *What should it look like?* on page 1).

Amending and Closing Requisitions/Orders
You can only amend a requisition up to the point of approval, once approved and converted into an order, it can no longer be amended. The order should be closed (contact **procurement@york.ac.uk** to request closure) and a new order raised.

Returns

- If you need to return an item it is the responsibility of the department to arrange a return/credit directly with the supplier. This isn’t processed through YEP.
- If you subsequently need to cancel the order, after contacting the supplier directly, please email **procurement@york.ac.uk** to request that someone closes it.
- You still need to goods receipt a returned item once a credit has been received.

Invoices

- All invoices should be received electronically by Accounts Payable. If you receive one directly, forward it to **accounts-payable@york.ac.uk** for paying.
- Please note an invoice cannot be paid unless you goods receipt the order first.
- For all invoice queries contact **accounts-payable@york.ac.uk**.
Approval Workflow

- Under £150 no approval required
- £150 - £5000 budget holder approval* (this is the named order-responsible person on the workorder)
- £5000 - £25000 high level approvers in the budget holding department (these were nominated by the department)
- £25000 Procurement

*Note, if the budget holder raises the requisition and it's above £150, it will go to another nominated approver, usually the line manager. Check the workflow on the requisition to see who it has gone to (see FAQs for guidance).

Training Resources

Note, these resources can also be found on the YEP webpage, under ‘Training’.

Quick cards provide easy to read guidance on specific topics:

- Catalogue requisitions
- Free-format requisitions
- Attaching documents to a requisition
- Goods receipting no task
- Goods receipting with an Agresso task
- Approving requisitions
- Managing rejected requisitions
- Requisition enquiries
- Printing/saving a copy of an order

There are eLearning modules available through the LMS. It’s best to log into the system before clicking on the video links (note the LMS is only available to staff - temps and students use the Finance Training for Associate/Temp Staff web page instead of the links below).

- Raising a catalogue requisition
- Raising a freeformat requisition
• Approving requisitions
• Goods receipting
• Requisition enquiries and managing rejected requisitions

Who do I contact if I have any questions or issues?
• Please ensure to check the YEP webpages and the FAQs to see if you can find an answer to your question before contacting the support team.
• If you can’t find an answer to your question, please contact finance-systems@york.ac.uk.
• If you need an order opening or closing, please email Procurement: procurement@york.ac.uk.
• For any changes to supplier details or with regards to invoices please email Accounts Payable: accounts-payable@york.ac.uk.
• If you believe your requisition (below £5,000) has gone to the wrong person for approval, please contact your Finance Administrator or Accountant to arrange amending the budget holder on the workorder.

Useful links
• Check if a supplier is on YEP
• Supplier Lookup
• Information on how to request a new supplier
• To add new workorders, use Authorised Systems Registration (note select Agresso)
• FAQs

For further information see the Finance webpages
• Finance home page
• YEP
• Buying goods and services information
• Finance dept contacts
• Mandatory Suppliers list